
Schedule No. **19**

**Local Government
MACSS-
Montana Association of County
School Superintendents
Records Schedule**

**Adopted by the Local Government
Records Committee, Oct. 2008**

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: **MACSS- Montana Association of County School Superintendents**

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
1.	ACCREDITATION REPORTS	2 years	
2.	CORRESPONDENCE <ul style="list-style-type: none">a. Officialb. Routinec. Transitory	<ul style="list-style-type: none">a. 5 yearsb. 3 yearsc. Until no longer needed	Offer to Archives
3.	DISTRICT BOUNDARIES <ul style="list-style-type: none">a. Abandonment/Consolidation Recordsb. District Boundary Recordsc. Territory Transfer Records	<ul style="list-style-type: none">a. Permanentb. Permanentc. Permanent	20-6-421 et seq. 20-6-215 20-6-105
4.	ELECTIONS <ul style="list-style-type: none">a. School Election Summaries/Returnsb. Trustees Election/Appointment Certificates/Oathsc. Trustee/Board Reorganization	<ul style="list-style-type: none">a. Permanentb. Permanentc. Permanent	20-20-416 20-3-307
5.	FINANCE <ul style="list-style-type: none">a. Annual Published Reportb. Audit Reportsc. Budget Annual Reportd. Claimse. County-wide Levy Distribution/ Annual equalization reportsf. Medicaid records –Some special ed studentsg. Office Budgeth. Office Receipts/P.O.si. School Budgetsj. School Budget Worksheetsk. Trustee Financial Summaryl. Warrantsm. Warrants Register	<ul style="list-style-type: none">a. 5 yearsb. 3 years **c. Permanentd. Audit + 7 yearse. Permanentf. 8 yearsg. 1 year after audith. 1 year after auditi. 8 yearsj. 8 yearsk. 5 yearsl. 7 years after auditm. 7 years after audit	20-3-205(x) c. (no longer in use) m. This is based on the requirements for school districts
6.	LEGAL <ul style="list-style-type: none">a. Hearing Officer records	<ul style="list-style-type: none">a. 10 years after resolution	20-3-210
7.	MINUTES	Permanent	
8.	PERSONNEL <ul style="list-style-type: none">a. Annual Data Collection/ADC/Fall Reportb. Applications (Teaching, Unsuccessful)c. Personnel Filesd. Teacher Certification Lists/Cardse. Teacher Contractsf. Unit renewal reportg. Grievance issues see item 6	<ul style="list-style-type: none">a. 5 yearsb. 3 yearsc. 8 years after retirement or terminationd. Permanente. 7 years after expirationf. 5 years	20-4-202

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ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
9.	PUPIL INFORMATION a. Attendance/Tuition Agreements b. Attendance Records c. School Census Data d. Home School Record e. Pupil Data & School Term Report f. Scholarship Record Class III g. Student Records h. Teachers' Registers of Students	a. 5 years b. Permanent c. Permanent (a pre-1974 record) d. Permanent* e. Permanent (no longer in use) f. Permanent (storage files only) g. Permanent* h. Permanent	c. no longer created e. no longer in use 20-1-212(2)
10.	TRANSPORTATION a. Bus Contracts b. Bus Driver List c. Bus Inspections, TR-13 d. Bus Registration, TR-1 e. Bus Reimbursement Claim, TR-6 f. Individual Transportation Claim, TR-5 g. Individual Transportation Contracts/Agreements, TR-4 h. Transportation Committee Minutes	a. 8 years after expiration b. 2 years c. 5 years d. 5 years e. 5 years f. 5 years g. 8 years after expiration h. Permanent	